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FinancialPlanning

Wealthtech Weekly

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Reporter

The stated theme for this year's T3 Conference was organic growth.

One firm that has taken this idea to heart is the $6.1 billion AUM Modern Wealth Management in Monterey, California. In the latest edition of "Show Me Your Stack," I spoke with Mike Capelle, co-founder and CEO, about how they have optimized their tech stack for organic growth.

Has your firm taken similar steps? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Using wealthtech for organic growth: Show Me Your Stack

Mike Capelle, co-founder and CEO of Modern Wealth Management in Monterey, California, is in charge of the tech stack at the $6.1 billion AUM firm.

- **When wealth firms finally admit they need a CTO**
  The question of when (or if) wealth management firms need to hire a chief technology officer depends upon a number of factors, but experts say CTOs can bring vision and leadership.
- **What's next for AI in wealthtech?**
  It's still not taking financial advisors' jobs, but the tasks it's taking on in the wealth space are expanding.
- **The 10 best- and worst-performing passive ETFs of the past 3 years**
  While actively managed ETFs may promise higher returns, passive ETFs are still an attractive option for investors.
- **AI for advisor growth: FINNY attracts industry leaders**
  Josh Brown, CEO of Ritholtz Wealth Management, invests in the fintech firm and joins its advisory board to help steer the product roadmap.

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